

How to Remove Data from Sage 50 Accounts – Following a data Archive.

Before performing any of these procedures ensure:

- A Sage Accounts Back Up has been taken
- A Sage Batch Controller Back Up has been taken
- No stock is allocated to Works orders in Sage Batch Controller
- All Delivery Notes in Sage Batch Controller have been updated to Invoicing

Clear the Audit Trail

If you have a large number of transactions, invoices, sales orders or purchase orders that you no longer require, deleting these will increase the speed of Sage Accounts. To clear the audit trail, please follow the steps below: *(Note deleting these will remove the information from The SOP and POP Modules)*

1. Take two backups of your data.
2. Print the Audit Trail Detailed report, Monthly Day Books, Sales and Purchase Nominal Listings and VAT Returns for the period you want to clear.
3. From within Sage Accounts, open the Tools menu, choose Period End then choose Clear Audit Trail.

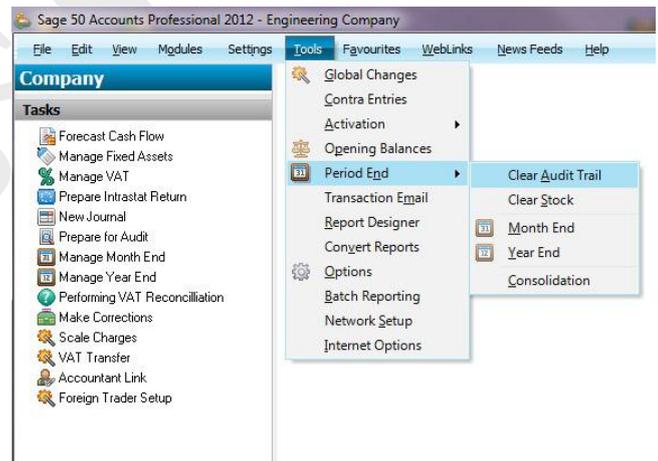
The Clear Audit Trail Wizard appears, follow the on-screen prompts to clear the audit trail.

4. In the Clear Transactions up to and including box, enter the date up to which you want to clear the audit trail.
5. When prompted to confirm that you want to run the Clear Audit Trail option, click Yes.

For further information about this, please refer to Ask Sage - Detailed Articles:

Notes on Clearing the Audit Trail

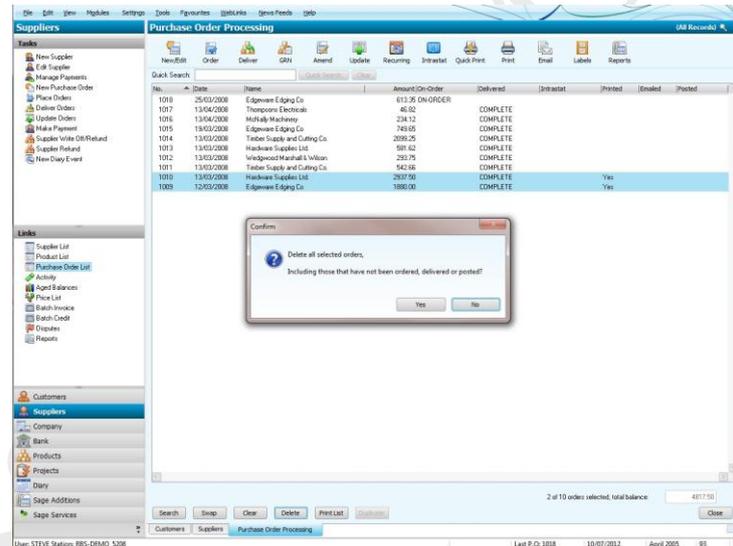
The Clear Audit Trail option can be run at any time to remove paid and reconciled transactions from the audit trail a history of the transactions that have been removed is kept making it easier to track transactions before and after the process.



Delete unwanted Invoices, Sales Orders and Purchase Orders.

To delete unwanted invoices, sales orders and purchase orders, please follow the steps below:

1. Take at least one backup of your data.
2. Open the Customers module, then from the Links pane click Invoice List or Sales Order List, or open the Suppliers module, then from the Links pane click Purchase Order List.
3. Select the invoices, sales orders, purchase orders you want to remove then click Delete.
4. When prompted to confirm the deletion of the entries, click Yes, and close the module.
5. Open the File menu, choose Maintenance then click Compress Data.
6. To compress the data files, deselect the Compress All Data Files check box, then deselect all of the check boxes except those relating to the areas where you have removed records then click Compress.



Clear Stock

The Clear Stock option can be run as part of the month or year end. Using the Clear Stock option you can remove transactions from your product activities prior to a specified date. This means that you can decide how long you keep individual transactions on your system.

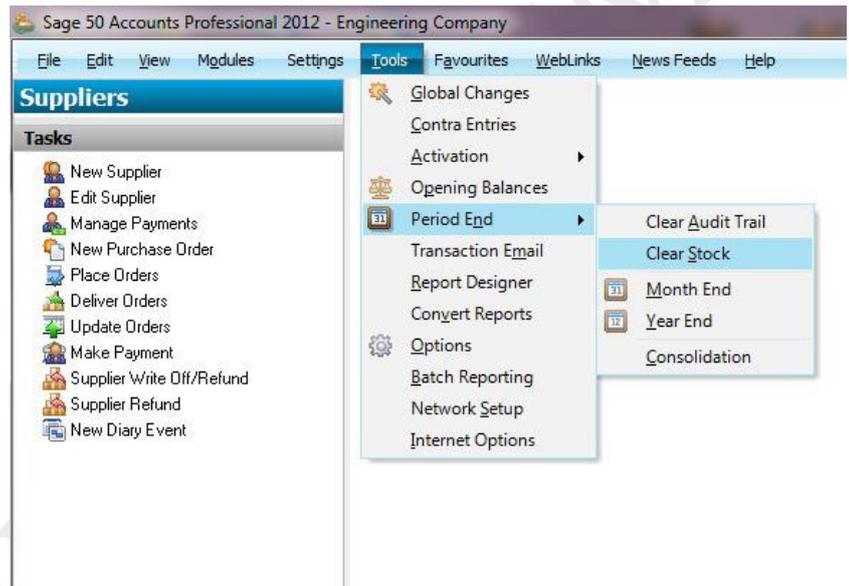
Note: Before you run the Clear Stock option, you should print your product valuation and product history reports and take at least one backup of your data. If you use the Retrospective Product Valuation report, you should not run the Clear Stock option.

Clear Stock - Step by Step

Note: This process is not reversible, and you should take at least one backup of your data before proceeding.

1. Open the Tools menu, choose Period End then choose Clear Stock.

A confirm window appears, informing you that the Clear Stock option permanently removes transactions from the Stock transaction history and asks if you want to continue.



2. To continue with the Clear Stock, click Yes.

The Clear Stock window appears.

3. In the Remove transactions dated before box, enter the date up to which you want to Clear Stock transactions.

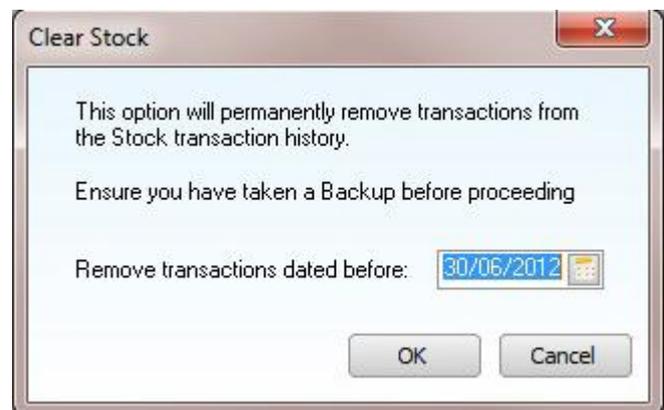
Note: The last date of the month prior to the current program date appears by default.

4. To continue with the Clear Stock, click OK.

Tip: If required, to exit without clearing the stock, click Cancel.

A message appears informing you that this process is not reversible.

5. To continue with the Clear Stock, click Yes.



Tip: If required, to exit without clearing the stock, click No.

The relevant stock transactions are cleared and the program desktop appears.

You have now cleared your stock transactions up to the specified date.

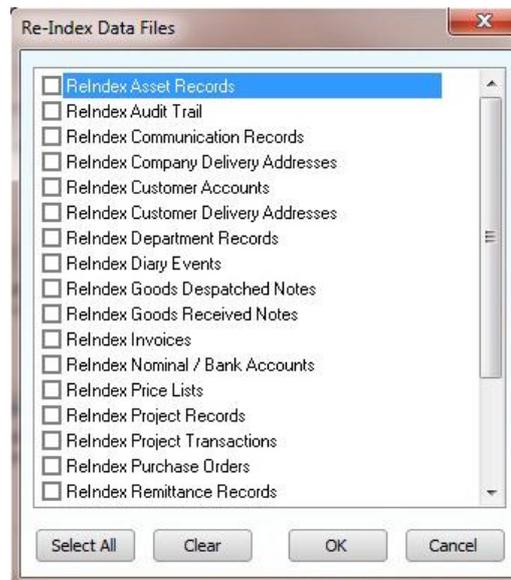
Reclaim Space Created from the Above Procedures

Take a Back Up of the Data

1. Select File Maintenance

Select Re-index To

- Audit Trail
- Customer Accounts
- Invoices
- Product Records
- Purchase Orders
- Sales Orders
- Supplier Accounts



Select Compress To

- Audit Trail
- Customer Accounts
- Invoices
- Product Records
- Purchase Orders
- Sales Orders
- Supplier Accounts

2. Run Check Data

